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ABSTRACT

This publication is one of five training manuals that present plans and materials for use in instructing school administrators in some of the concepts, principles, and techniques of educational management. They were developed as part of the Educational Management Project for presentation at weekly inservice meetings for administrators in the Tucson Public Schools in 1973-74. Altogether, the five manuals contain outlines and instructional materials for 15 inservice training sessions; this particular booklet deals with sessions 14 and 19, which focus on the organizing and controlling functions of educational administrators. The set of materials for each session includes (1) an instructor's guide and a list of the performance objectives for that session, (2) participant handouts for use as reference material during and after the session, (3) participant worksheets for illustrating or practicing skills introduced during the session, and (4) a posttest for determining whether the participants met the session's objectives. The sessions may be conducted separately as topical workshops or together as a comprehensive one-semester inservice course. (Author/JG)

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EDUCATIONAL MANAGEMENT

AN INSERVICE TRAINING MANUAL FOR EDUCATIONAL ADMINISTRATORS

PART V

THE ORGANIZING AND CONTROLLING FUNCTIONS

Management Study Group Sessions 14, 19

Produced by
The Educational Management Project
E.S.E.A. Title III
Tucson Public Schools
Tucson, Arizona
June, 1974

EA 008 066

TO THE PROSPECTIVE INSTRUCTOR:

These materials are part of a set of 17 sessions for instructing practicing school administrators in some of the concepts, principles and techniques of educational management. They were originally designed to be conducted at weekly inservice meetings for administrators in Tucson, Arizona during the 1973-74 school year.

To become familiar with the scope of educational management, an administrator should participate in all 17 sessions. However, if you are interested in introducing administrators to only certain aspects of the field, almost any session can be conducted as a unit.

Each set of session materials consists of these items:

1) An instructor's guide for conducting each session activity and a list of the performance objectives for that session
2) All participant handouts for use as reference material during and after the session
3) All participant worksheets for illustrating or practicing skills introduced during the session
4) A posttest for determining whether the participants met the session's objectives (which may also be administered as a pretest).

Each two-and-a-half-hour session was designed to be conducted in three parts:

1) Review of the previous session and informal conversation (15-45 minutes)
2) Administration of pretest for current session and posttest for previous session, discussion of posttest (15-30 minutes)
3) Session activities as described in the instructor's guide (up to 2 hours)

Most of the sessions, however, take longer to conduct than two and a half hours. Depending upon the administrators' level of interest and the degree of difficulty they have in understanding session topics, the total time needed can be as much as 5-6 hours. Be prepared to schedule a second meeting to complete each session.

Before you schedule and conduct any of the sessions, make sure you are prepared to lead the discussions and answer any questions raised by the administrators in the group. To help you do this, we have prepared a list of readings keyed to each session topic (or to sets of related topics). This annotated bibliography is available from the Project under the title of "Readings for the Preparation of the Study Group instructor".

EDUCATIONAL MANAGEMENT PROJECT
E.S.E.A. Title III
Tucson Public Schools

Management Study Group

Session 14

The Controlling Function of Management

Objectives

After participating in this session's activities, the participants will:

1. Comprehend the concept of control as one of the four management functions. They will be able to describe the purpose of control and the three-step process of control. (13)
2. Comprehend the concept of evaluation as the process which serves the information needs of the decision maker. They will be able to name the kinds of evaluation information needed for each of the four kinds of decisions a manager makes and give an example of information in each category. (13)

Participant achievement will be measured by means of a written posttest and performance is to be evaluated against the criteria described on the key to the posttest.

Activities for Part 3 of This Session

14-1 Definition of the Controlling Function
(30 minutes)

After announcing the topic of the session, ask the group to describe their impressions of the meaning of the word "control." Summarize their responses on the chalkboard, permitting only enough discussion to clarify the definitions that are offered. Define the controlling function for the group as conceived in the educational management context, pointing out where it resembles or differs from the impressions and definitions offered by the group. If the participants show any discomfort with the term, "control", ask them to suggest synonymous terms from their own vocabularies. Distribute Handout 14-1 in order to provide the participants with an illustration of the concept of control and the three major steps of the controlling process.

14-2 The Dependence of Control on Good Planning
(30-40 minutes)

Point out to the group that the first step of the controlling process, identifying discrepancies between what you set out to accomplish and what you are actually accomplishing, is heavily dependent upon the quality of program planning.

Emphasize that the less specific a program plan is, the more impossible it will be to control the success of the program in operation. To illustrate how planning effects a manager's ability to control, distribute Worksheet A, Program Controlling Information Set I, to the participants. Ask them, in groups of two or three, to examine the information given and arrive at some answers to the questions on the last page of the worksheet. After about 10 minutes, ask each group to report whether they think there are any discrepancies evident in the information they had been given. Discuss how the lack of specificity in the plan can make even the most detailed evaluation information meaningless to the manager.

Distribute Worksheet B, Program Controlling Information Set II, to the participants, and ask them to try to examine it in the same way as for Worksheet A. After about 10 minutes, compare and discuss their conclusions from the worksheets, and ask them to state which one they believe to be the most informative and why.

14-3 Evaluation and Its Relationship to the Management Process (45 minutes)

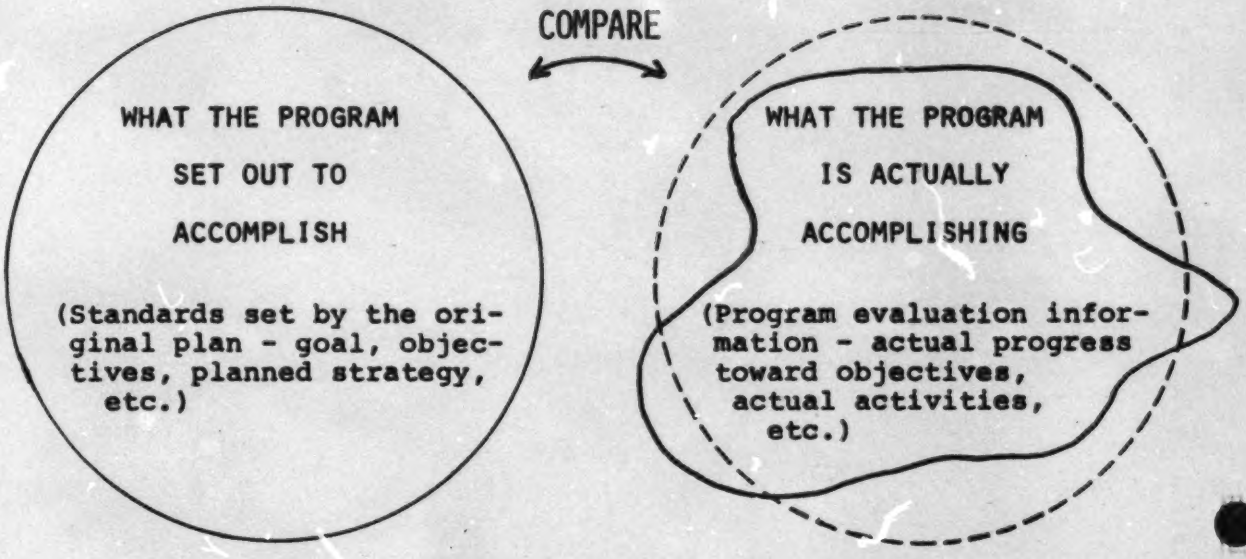
Introduce the Stufflebeam taxonomy for classifying decisions and distribute Handout 14-2. Explain the four kinds of decisions to the group and encourage discussion for clarification of the differences among the four types.

Ask each member of the group to reflect on his activities for the past week or two and to briefly describe the situation which has required the most of his attention. Ask each person to try to identify some of the questions which arose, and list as many of these questions on the chalkboard as possible. When a list of these questions has been recorded, ask the group to classify each one in terms of the four types of decisions described by Stufflebeam.

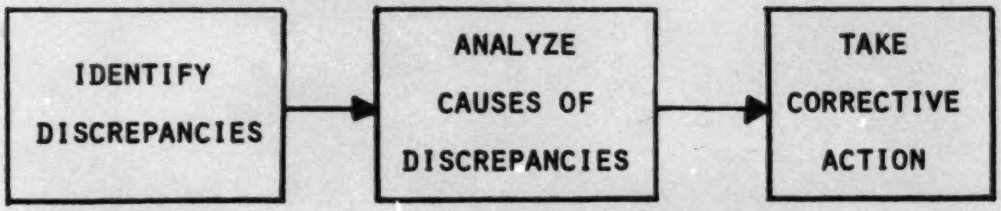
Distribute Handouts 14-3 and 14-4 to the group, and describe the CIPP Evaluation Model and the role of the evaluation process in the entire management process. Ask the participants to look at Worksheets A and B again and identify which of the four kinds of evaluation information were being reported there. After the group have had a chance to classify the worksheet information and are content that process and product evaluation were being reported, distribute Handout 14-5 to better illustrate the relationship of evaluation information to decisions. Ask the participants to give examples of information they have used or needed that are pertinent to context and input evaluation. Point out that those efforts commonly termed needs assessments are activities requiring planning decisions. The

The kinds of data collected in order to determine educational needs fit into the category of context evaluation as well as data which just generally describe the student, staff and community characteristics pertinent to educational programming.

THE CONTROLLING FUNCTION OF EDUCATIONAL MANAGEMENT


COMPARE
WHAT THE PROGRAM SET OUT TO ACCOMPLISH
(Standards set by the original plan - goal, objectives, planned strategy, etc.)
WHAT THE PROGRAM IS ACTUALLY ACCOMPLISHING
(Program evaluation information - actual progress toward objectives, actual activities, etc.)

THE CONTROLLING PROCESS:



Program Controll[illegible] Information Set I

Report Date: October 13, 1972

Planned Mathematics Program	Information On Implemented Program
Program Goal To improve student performance in mathematics.	**Program Goal** To improve student performance in mathematics.
Program Objective The eighth grade students will increase their knowledge and comprehension of mathematics during the school year 1972-73 as indicated by standardized test scores.	**Program Objective** The eighth grade students will increase their knowledge and comprehension of mathematics during the school year 1972-73 as indicated by standardized test scores.
Program Activities 1. A one week mathematics workshop will be given to eighth grade teachers. 2. A new mathematics textbook will be utilized during the 1972-73 school year.	**Program Activities** 1. Eighty percent of the teachers who registered for the workshop participated. 2. The new mathematics textbook was selected on July 6, 1972 for the 1972-73 school year.
Evaluation Design Pre/Posttesting (Standardized Achievement Scores).	**Evaluation Design** 1. The pretest was given on October 13, 1972. 2. This years' students are entering the eighth grade with the same test scores as last years' students. 3. The posttest is scheduled to be given June 1, 1973.
Monitoring The mathematics teachers will turn in monthly progress reports on the material their class has covered.	**Monitoring** Sixty percent of the eighth grade mathematics teachers are turning in half page hand written monthly progress reports.

Group Discussion Question (write answers)

1. What inconsistencies exist between the planned and implemented program?

2. What are the causes of the inconsistencies?

3. What decisions would be necessary to correct (control) the situation?

Program Controlli[illegible] Information Set II

Progress Report Date: October 13, 1972

Planned Mathematics Program	Information On Implemented Program
Needs Assessment During the 1970-1971 and 1971-1972 school years, the students in grade eight of the Cactus Junction school district were tested with standardized achievement tests. The results revealed that less than thirty percent of the students demonstrated a gain of at least one year grade equivalent in mathematics.	**Needs Assessment** During the 1970-1971 and 1971-1972 school years, the students in grade eight of the Cactus Junction school district were tested with standardized achievement tests. The results revealed that less than thirty percent of the students demonstrated a gain of at least one year grade equivalent in mathematics.
Program Goal To improve student performance in mathematics.	**Program Goal** To improve student performance in mathematics.
Program Objective Sixty percent of the eighth grade students will increase their knowledg and comprehension of mathematic concepts* one stanine during the school year 1972-73 as indicated by the Advanced Metro 70 Achievement Battery (mathematics test) by May 1, 1973.	**Program Objective** Sixty percent of the eighth grade students will increase their knowledge and comprehension of mathematic concepts* one stanine during the school year 1972-73 as indicated by the Advanced Metro 70 Achievement Battery (mathematics test) by May 1, 1973.

*Eighth grade mathematics concepts given priority.
1. integers
2. non-metric geometry
3. metric geometry
4. exponential notation
5. real numbers

Planned Mathematics Program	Information On Implemented Program
Progress Report Date: October 13, 1972	
Program Activities 1. A new mathematics textbook meeting the criteria (priority concepts) established by mathematics curriculum coordinator and a steering committee of seven eighth grade mathematics teachers will be selected by April 1, 1972. 2. A one-week mathematics workshop will be given to all eighth grade mathematics teachers (20) one week before their contract begins. This workshop will emphasize the math concepts of priority, appropriate teaching methods for those concepts, and use of the new textbook and supplementary materials.	**Program Activities** 1. The new math text was selected on March 25, 1972. An order for 600 copies was placed with the publishing company April 18, 1972 at $4.15 each. 2. Sixty percent of the eighth grade mathematics teachers attended the workshop. These teachers successfully reviewed the priority math concepts, appropriate teaching methods, and the parts of the new text which emphasized these concepts.
Evaluation Design 1. Pretesting of all eighth grade students on September 15, 1972. 2. Posttesting of all eighth grade students on May 7, 1973. **Analysis** Percent of students who gain 1 stanine from pre- to posttesting will be computed. **Test Selection** The Advanced Metro 70 Math Achievement Test was selected since it tests (80% of the test) the math concepts given priority in the math program.	**Evaluation Design** 1. The pretesting was carried out on September 15, 1972, under the direction of the project coordinator as scheduled. 2. Posttesting is still to be performed (May 7, 1973). **Analysis** Percent of students who gain 1 stanine from pre- to posttesting will be computed. **Test Selection** The Advanced Metro 70 Math Achievement Test was selected since it tests (80% of the test) the math concepts given priority in the math program.

Planned Mathematics Program	Information On Implemented Program
Progress Report Date: October 13, 1972	
Monitoring All eighth grade mathematics teachers (20) will turn in monthly progress reports to the project coordinator following a report format covering content (concepts) covered, methods used, and specific exercises assigned from texts and supplementary materials.	Monitoring Sixty percent of the eighth grade math teachers are turning in the monitoring reports following the prescribed format. Twenty percent of the eighth grade math teachers are turning in half page hand written reports not following the format.

Group Discussion Questions (write answers):

1. What inconsistencies exist betweer the planned and implemented program?

2. What are the causes of the inconsistencies?

3. What decisions would be necessary to correct (control) the situation?

Worksheet 14-A

No discrepancies can be identified from the data given since the Planned Mathematics Program is too vaguely defined to make it possible to interpret the meaning of the Information on the Implemented Program.

Worksheet 14-B

Discrepancies:

1. Though the workshop was successful for 60% of the faculty, the skills and orientations of the remainder of the faculty are still unknown. If they are inadequate, success in reaching objectives could be reduced.

2. While more evaluation information would be desirable, there is some indication that the monitoring reports could become a source of trouble requiring either a change in the prescribed format or in the accuracy with which teachers follow the format.

Causes: Cannot be firmly identified from information given.

Decisions required: Further data collection needed to determine any changes needed.

TYPES OF DECISIONS

	INTENDED	ACTUAL
ENDS	**PLANNING DECISIONS** TO DETERMINE OBJECTIVES	**RECYCLING DECISIONS** TO JUDGE AND REACT TO ATTAINMENTS
MEANS	**STRUCTURING DECISIONS** TO DESIGN PROCEDURES	**IMPLEMENTING DECISIONS** TO UTILIZE, CONTROL AND REFINE PROCEDURES

Source: Stufflebeam, D.L., et al. (PDK National Study Committee on Evaluation). Educational Evaluation and Decision Making. Itasca, Ill.: F.E. Peacock Publishers, 1971.

HOW THE MANAGEMENT AND EVALUATION PROCESSES ARE RELATED

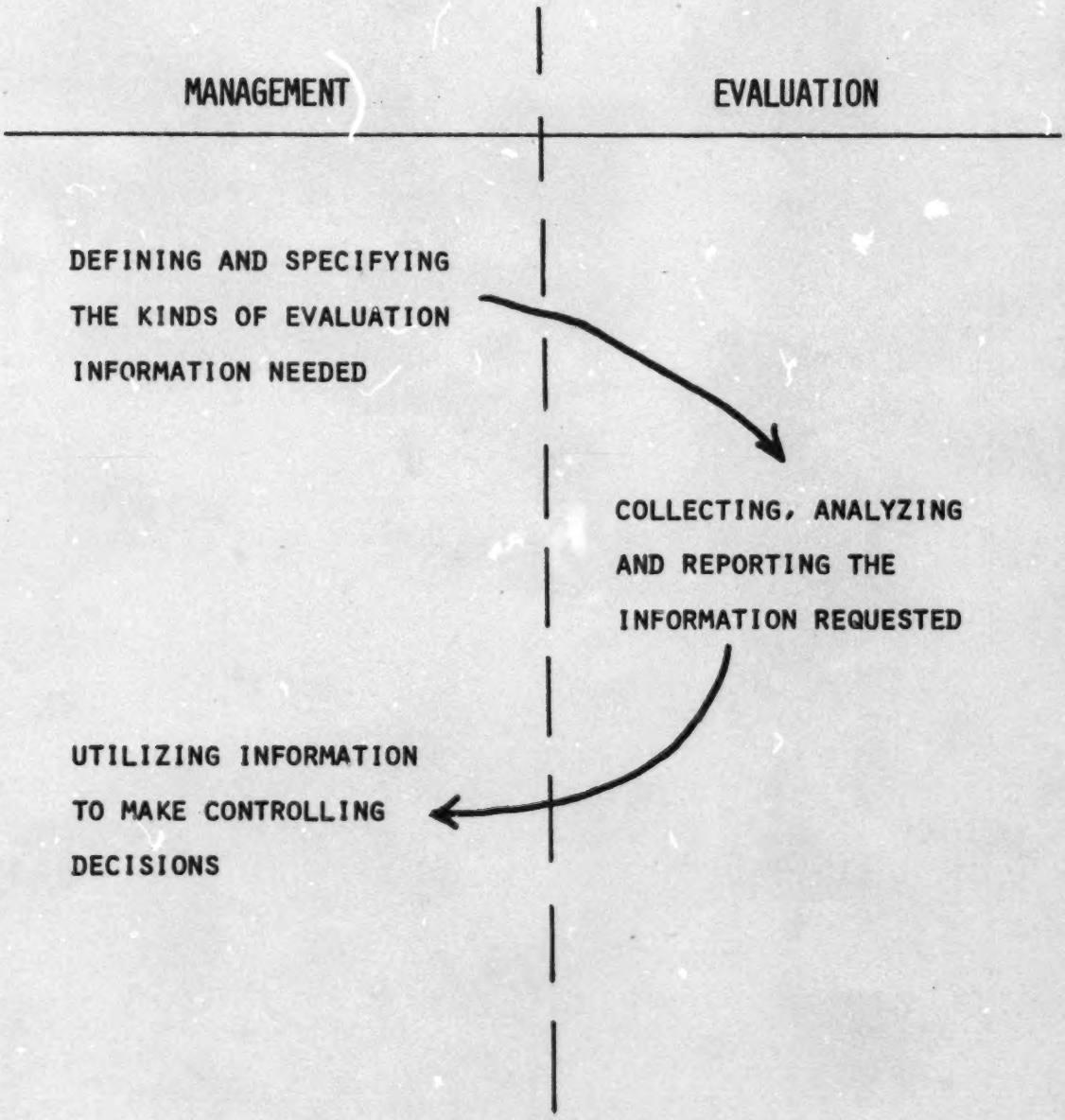

MANAGEMENT
EVALUATION
DEFINING AND SPECIFYING THE KINDS OF EVALUATION INFORMATION NEEDED
COLLECTING, ANALYZING AND REPORTING THE INFORMATION REQUESTED
UTILIZING INFORMATION TO MAKE CONTROLLING DECISIONS

Figure 1

The CIPP Evaluation Model

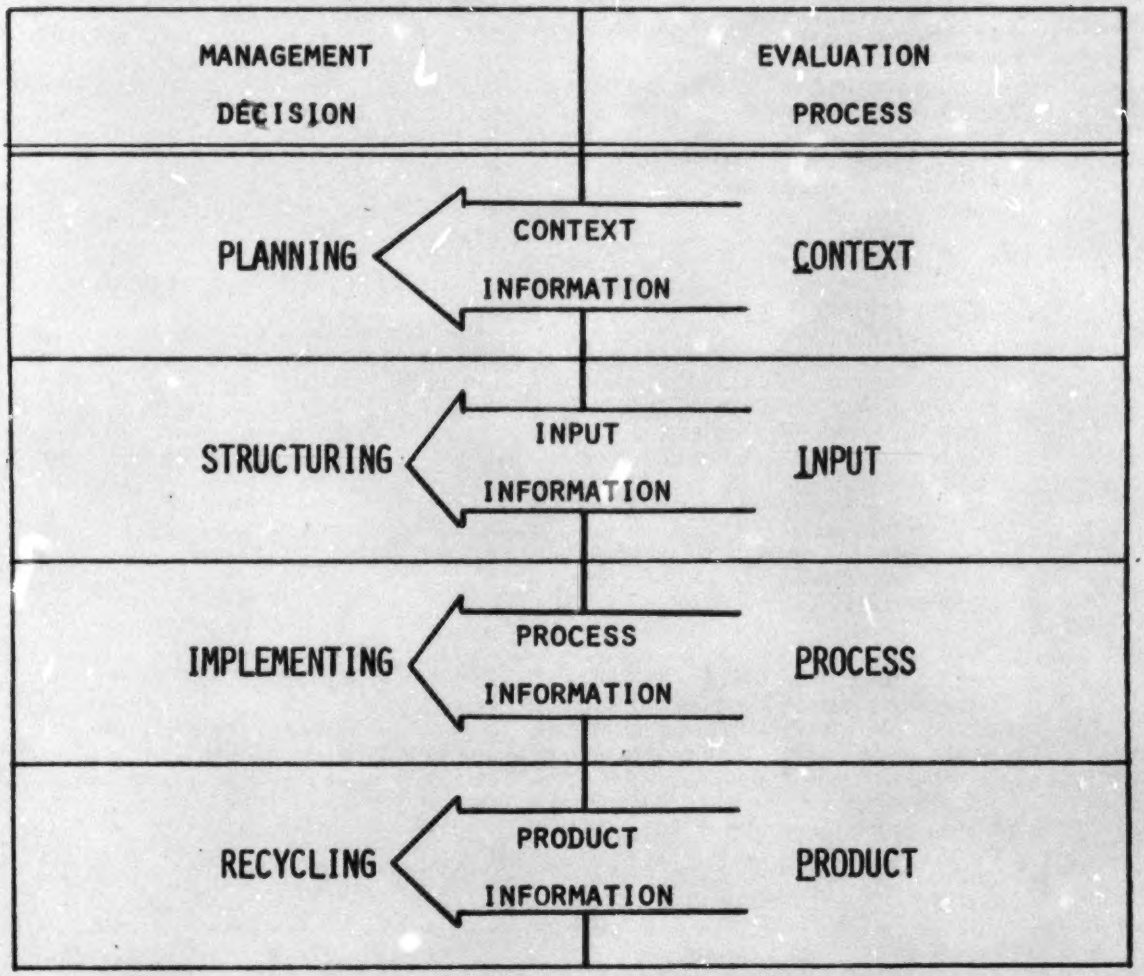
A Classification Scheme of Strategies for Evaluating Educational Change

The Strategies

	Context Evaluation	Input Evaluation	Process Evaluation	Product Evaluation
OBJECTIVE	To define the **operation context**, to identify and assess **needs** in the context, and to identify and delineate **problems** underlying the needs.	To identify and assess **system capabilities**, available input **strategies**, and **designs** for implementing the strategies.	To identify or predict, in process, defects in the precedural design or its implementation, and to maintain a record of **procedural events** and **activities.**	To relate **outcome information** to objectives and to context, input, and process information.
METHOD	By describing individually and in relevant perspectives the major sub-systems of the context; by comparing actual and intended inputs and outputs of the subsystems; and by analyzing possible causes of discrepancies between actualities and intentions.	By describing and analyzing available human and material resources, solution strategies, and procedural designs for relevance, feasibility and economy in the course of action to be taken.	By monitoring the activity's potential procedural barriers and remaining alert to unanticipated ones.	By defining operationally and measuring criteria associated with the objectives, by comparing these measurements with predetermined standards or comparative bases, and by interpreting the outcome in terms of recorded input and process information.
RELATION TO DECISION-MAKING IN THE CHANGE PROCESS	For deciding upon the **setting** to be served, the **goals** associated with meeting needs and the **objectives** associated with solving problems, i.e., for planning needed changes.	For selecting **sources of support**, solution **strategies**, and procedural **designs**, i.e., for programming change activities.	For **implementing and refining the program design and procedure**, i.e., for effecting process control.	For deciding to **continue, terminate, modify or refocus** a change activity, and for linking the activity to other major phases of the change process, i.e., for evolving change activities.

Stufflebeam, Daniel L. Toward a Science of Educational Evaluation. The educational technology review series: Evaluation of education. Educational Technology Publications, n.d.

EVALUATION INFORMATION AND MANAGEMENT DECISIONS



EDUCATIONAL MANAGEMENT PROJECT
E.S.E.A. Title III
Tucson Public Schools

Management Study Group

Session 14 Posttest

NAME: _____

DATE: _____

1. In your own words, describe the controlling function of the educational manager (its purpose and the major kinds of activities the manager who is engaged in control conducts or supervises).

2. For each of the types of decisions a manager makes which are listed below, name the kind of evaluation information he needs (in terms of the Stufflebeam evaluation model) and then define or give an example of that kind of evaluation information.

TYPE OF DECISION	KIND OF EVALUATION INFORMATION NEEDED	DEFINITION OR EXAMPLE
PLANNING		
STRUCTURING		
IMPLEMENTING		
RECYCLING		

1. A paraphrased definition of controlling as the identification of discrepancies between what is being accomplished and what level of accomplishment was planned for the purpose of maximizing the success of a program in meeting its objectives. When causes of discrepancies are identified, action is taken to get the program back on course.

2.	Kind of Information	Definition or Example
Planning:	Planning	Information about needs and/or other characteristics of target population.
Structuring:	Input	Information about relative projected cost and effectiveness of available solutions.
Implementing:	Process	Information about the degree to which planned activities are being successfully conducted.
Recycling:	Product	Information about degree to which program objectives are being met.

EDUCATIONAL MANAGEMENT PROJECT
E.S.E.A. Title III
Tucson Public Schools

Management Study Group

Session 19

The Organizing Function of Management

Objectives

After participating in this session's activities, the participants will:

1. Comprehend the concept of organizing as one of the four management functions. They will be able to describe the purpose of organizing and list at least three kinds of management activities which are organizing activities. (13)
2. Comprehend the concepts of line, staff and functional authority relationships. They will be able to define all three terms in their own words and by so doing, state their essential differences. (13)
3. Comprehend the concept of organizational structure. They will be able to define this concept in writing, conveying the meaning of the definition given during the session. (13)

Activities for Part 3 of This Session

19-1 Definition of the Organizing Function
(30 minutes)

Refer the participants to Handout 1-3, The Four Functions of Educational Management and ask them to reread the definitions of organizing and directing. Ask them what differences and similarities they find between the two definitions. Point out that the focus of the planning and controlling functions is on programs (planned and actual) while the directing and organizing functions focus primarily on the people who implement programs.

Concentrating on the organizing and directing functions, explain that, of the two functions, the organizing function is more closely related to the planning and controlling functions. It is concerned with the effective performance of program-related duties, while the directing function is concerned with the needs, feelings and qualities of the individual human beings performing these duties. Suggest to the group that they use the key phrases, "job performance" and "work satisfaction" to identify the major emphases of the organizing and directing functions respectively.

Ask the group to give examples of activities an educational administrator might engage in in order to have a staff who

perform all the duties required for successfully operating an educational program. List their examples on the chalkboard. When the list is complete classify the examples according to the categories on the taxonomy for classifying management activities associated with organizing. Delete activities listed which are not organizing activities and add any categories the participants' examples did not include. Refer the participants to their own copies of the taxonomy in their Session 1 materials.

19-2 Organizational Structures and the Kinds of Authority of Which They are Composed
(45 minutes)

Introduce the concept of organizational structure to the participants by defining it as the formal decision-making network of an organization. This network is composed of the interrelationships of three kinds of formal authority for influencing the actions of the organization. These three kinds of authority are line authority, staff authority and functional authority. Distribute Handout 19-1, Organizational Structure and Kinds of Authority, to the participants. Discuss these definitions with the group and ask them to give examples of each kind of authority relationship in their own organization in order to assure their understanding of the concepts. Clarify any misconceptions, concentrating on the distinction between staff authority and functional authority since they are easily misunderstood.

Distribute Handout 19-2, Rules for Organizational Charting, to the participants, and explain that the difference between an organizational structure and an organizational chart is analogous to the difference between a machine or appliance and its parts diagram. Ask the participants to read the handout and then instruct each person to draw an organizational chart to show the relationships of his position to those positions he supervises and the position of the top administrator in his organization. Ask one or two of the participants to reproduce their charts on the chalkboard, and have the entire group evaluate the chart(s) as to whether they 1) follow the rules of charting and 2) accurately reflect the actual relationships of the person who drew the chart with the other positions in the organization.

19-3 Developing the Position Description
(45 minutes)

Referring the participants to the taxonomy for classifying management activities, point out that the definition of authority relationships is only one of several activities associated with the organizing function. In order to

develop an effective organizational structure, the educational manager must have an accurate understanding of the kinds of duties which must be performed in order to meet the goals and objectives of the organization. In order to perform competently and with a sense of security in doing so, each person assigned a group of tasks to perform must know quite specifically what is expected of him. The tool for performing the organizing activities of selecting, orienting and evaluating personnel is the position description (or to some, the job description). Point out that the taxonomy is a skeletal position description for the educational manager and that each activity on the taxonomy could be formulated in more specific terms to represent the expectations of any school principal in his role as educational manager (or instructional leader, a synonym more commonly used). Other administrators in an educational organization as well could use the taxonomy to develop their own position descriptions, even if they have no subordinate staff and can exercise no line authority.

Distribute Handout 19-3, Two Approaches to the Development of a Position Description, to the participants. Explain that if they were to catalog their present activities and then classify them using the categories of the taxonomy, they would be using an inductive approach. If they were to take each taxonomy category in turn and list the tasks they perform which fall into those categories, they would be using the deductive approach. Point out that it is preferable to use the deductive approach to developing a position description since it better assures that a person's working activities contribute to the goals of the organization and helps one avoid including in the position description idosyncratic activities which bear little or no relationship to organizational goals.

If time permits, ask each participant to prepare at least a partial position description for the position to which he is assigned. Ask the participants to evaluate each other's position descriptions for clarity and completeness. Discuss the potential value of having such position descriptions prepared for every member of their staffs.

Organizational Structure and Kinds of Authority

ORGANIZATIONAL STRUCTURE:

The formal decision-making network of an organization. It is composed of the three kinds of authority which influence the actions of an organization: Line authority, staff authority and functional authority. Organizational structure is not an organizational chart; it is the network of working relationships the chart represents.

LINE RELATIONSHIP:
A relationship in which one position has the authority to direct the operational activities of that position immediately beneath it in the organization's line of command.

STAFF RELATIONSHIP:
A relationship in which a person in one position serves in an advisory capacity to a position in the organization's line of command. The "line" person conveys advice, recommendations, and information to his line subordinates at his discretion; the "staff" person ordinarily does not deal directly with the line subordinate in any way.

FUNCTIONAL AUTHORITY:
Basically, line authority which is delegated to a position which ordinarily has a staff relationship to the line of command. There are three levels of delegation of functional authority:

1) Superior delegates to staff person authority to give advice directly to the persons directly under his authority in the line.
2) Superior delegates authority to staff person for not only giving information, advice and recommendations but also to consult with persons under him and to demonstrate applications of recommendations.
3) Superior delegates authority to staff person to prescribe processes, approaches, or even policy and carry through with the supervision of them in operation. (Feyereisen, et. al., 1970, p. 22)

Rules for Organizational Charting

1. Definition:

   An organizational chart is a skeletal representation of an organization's decision-making structure. It is capable of portraying only the most basic authority/responsibility relationships.

2. Important principles:

   a. To be a useful management tool, the chart must be communicative.
   b. To be communicative, the chart must be internally consistent and must utilize conventional charting techniques. Unconventional techniques must be explained on the chart.

3. Conventions of organizational charting:

   a. Labelling "boxes"

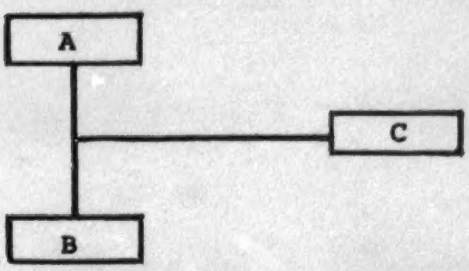
      --Use the same box shape throughout the chart; don't mix circles, ovals, boxes, etc. on the same chart.

      --Label all the boxes with position titles, not functional unit titles; people make decisions, departments and schools as such do not.

      Note: Students are typically not part of the decision-making structure but are usually its beneficiaries.

   b. Distinguishing line and staff relationships

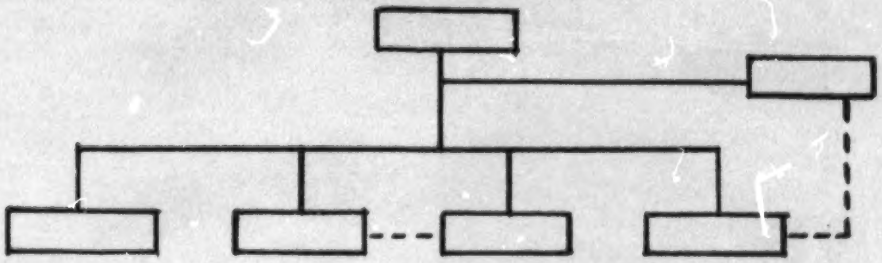
      --Line relationships are indicated by unbroken vertical lines; staff relationships are indicated by either unbroken or dotted horizontal lines.



In this illustration, A and B have a line relationship. A and C have a staff relationship, i.e., C advises A who in turn commands B. (C does <u>not</u> advise B directly.)

      --Use of arrows on an organizational chart is unnecessary. It is to be assumed that line relationships proceed downward and staff relationships proceed upward in the chart.

--The chart must be a branching hierarchy of relationships; "vicious circles" of authority and responsibility are not only "against the rules" but say nothing about the real relationships involved.



In the above illustration the dotted lines create "vicious circles" of authority and responsibility and are therefore incorrect. Usually such "vicious circles" are used in an attempt to show functional authority, which is a legitimate relationship, but is usually difficult to illustrate on an organizational chart.

Two Approaches to the Development of a Position Description

Deductive Approach

A POSITION is an aggregate of roles;

A ROLE is composed of one or more functions;

A FUNCTION is composed of one or more specific tasks;

A TASK is a specific, observable action

Inductive Approach

A TASK is a specific, observable action

A FUNCTION is a set of interrelated tasks

A ROLE is a set of interrelated functions

A POSITION is a set of interrelated roles

Educational Management Proejct
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Management Study Group
Session 19 Posttest

NAME: _____

DATE: _____

1. In your own words, describe the purpose of the organizing function of management and give at least three examples of organizing tasks the manager performs.

2. Define line authority, staff authority and functional authority and describe how these three kinds of authority differ from each other.

3. What is an organizational structure?

1. The organizing function consists of those activities of a manager related to the assignment of appropriate authority and responsibility for managing and operating a program. Such activities include departmentation, delegation of authority, defining authority relationships, selecting personnel, evaluating their performance and orienting new personnel.

2-3. Definitions should be adequate paraphrases of the definitions given on Handout 19-1.